

PARTNERSHIP, MOU, AND FISCAL SPONSORSHIP REVIEW POLICY

Preserving Heritage. Building Opportunity. Organizing Community Engagement.

Policy Number	HOA-POL-011
Effective Date	Upon Board Adoption
Approved By	Board of Directors
Applies To	Directors, officers, committees, advisory members, volunteers, employees, contractors, partners, and program participants as applicable

Purpose

This Policy governs partnerships, memoranda of understanding, fiscal sponsorships, collaborations, program alliances, and agreements involving Heritage & Opportunity Alliance, Inc..

Scope

This Policy applies to arrangements with nonprofits, youth sports organizations, schools, churches, artists, public agencies, funders, developers, businesses, fiscal sponsors, fiscal projects, community groups, and service providers.

Review Standard

Every partnership must preserve the corporation's independence, charitable mission, 501(c)(3) compliance, financial controls, resident privacy, youth safety, public credibility, and Board authority.

Partnerships shall be documented when roles, funds, public commitments, youth activities, branding, insurance, data, facility access, restricted funds, or deliverables are involved.

Required Review Questions

Before approval, the Board or authorized officers should determine: the purpose; partner identity; roles; money flow; insurance needs; youth-safety issues; data sharing; conflict of interest; use of name/logo; deliverables; reporting; termination rights; and whether the arrangement creates private benefit or mission drift.

MOUs and Agreements

MOUs should identify parties, purpose, term, roles, funding responsibilities, insurance, confidentiality, branding, data, youth safety, reporting, intellectual property, termination, and dispute handling.

No MOU, fiscal sponsorship agreement, grant agreement, facility agreement, lease-related commitment, or partner contract may be signed without Board approval or written officer authority.

Fiscal Sponsorship

If the corporation acts as or uses a fiscal sponsor, the relationship must be documented in a written agreement approved by the Board. Fiscal sponsorship must specify charitable control, restricted fund tracking, fees, reporting, eligible expenses, grant compliance, ownership of materials, termination, and fund disposition.

Separate Identity

Partner organizations retain their own legal identity, leadership, finances, insurance, staff, volunteers, operations, and liabilities unless a written agreement states otherwise.

Records

The Secretary, Treasurer, or other Board-authorized records officer shall maintain records created under this Policy according to the Records Retention and Document Control Policy.

Records may include approvals, disclosures, invoices, receipts, reports, correspondence, minutes, incident reports, releases, agreements, restricted-fund logs, or other supporting documents.

Heritage & Opportunity Alliance, Inc.

Violations

Violations of this Policy may result in corrective action, reassignment, removal from a committee or volunteer role, termination of a contract, repayment, report to the Board, or other action permitted by law and organizational policy.

Retaliation against a person who raises a good-faith concern is prohibited.

Review and Amendment

This Policy may be reviewed at least annually and may be amended by the Board of Directors. The Board may adopt more detailed procedures, forms, checklists, and approval schedules consistent with this Policy.

Board Adoption

This Policy is adopted by the Board of Directors and remains in effect until amended, replaced, or rescinded by the Board.

Board Chair / President	Secretary
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____